



2007 HRA Coordinators Manual

PROGRAM OVERVIEW

The HRA Volunteer Program encompasses Homeowner and Renter Assistance and Property Tax Postponement. The objective of the program is to provide free, easily accessible assistance to United States Citizens AND qualified aliens who are 62 years of age or older, blind, or disabled and have a household income of \$42,770 or less. The volunteer's role is to complete homeowner or renter assistance claim forms. Volunteer assistance is available from July 1 through October 15, 2007. In all cases, volunteers must provide their assistance free of charge. During the 2006 HRA filing season, volunteers worked approximately 31,500 hours and assisted over 65,471 claimants.



Homeowner and Renter Assistance Program (HRA)

This program provides a once-a-year reimbursement by the State of California. This reimbursement is a portion of the property taxes paid on a claimant's home (or in the case of a renter, presumed to have been paid indirectly towards the property taxes through their rent payments). The Franchise Tax Board administers this program.



Property Tax Postponement Program

The Property Tax Postponement Program allows qualified homeowners to postpone payment of property taxes on their homes.

The State Controller's office has full responsibility for administering the Property Tax Postponement Program. However, the Franchise Tax Board offers support to claimants through the Volunteer Program. The filing period is May 15 - December 10.



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Major Activities

The HRA Volunteer Program has 10 activities, or areas of concern

- Organization and Contacts.
- Planning and Administration.
- Recruiting Sponsors and Volunteers.
- Sponsor and Site Coordination.
- Training for Trainers and Volunteers.
- Publicity.
- Recognition of Volunteers and Sponsors.
- Program Evaluation.
- Record Keeping and Reports.
- Support for Volunteers and VPC.

This manual covers the general responsibilities of the Public Education Team, the Volunteer Program Coordinator (VPC) and the Sponsors with regard to each of the major activities.

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The Program Overview Section gives an overview of how the Volunteer Program is organized along with names, addresses, and telephone numbers of contact persons.



Franchise Tax Board (FTB)

The HRA Volunteer Program is administered by the Public Education Team, within the Professional Resources & Education Section (PRES) and by Volunteer Program Coordinators located throughout the state of California.

The Public Education Team

Located at ((****))
, the Public Education
Team is responsible for:

- Establishing policies and procedures.
- Developing training concepts and materials.
- Training the trainers.
- Evaluating the program.
- Coordinating the program on a statewide level with the VPC's and sponsors.

Within PRES, the responsibility for managing the HRA Volunteer Program on a statewide level and developing the training program and reference manual is assigned to ((****)), Statewide Volunteer Program Coordinator.

Statewide Volunteer Program Coordinator

((****))
((****))

Statewide Coordinator HRA

((****))
((****))

((****))
((****))

The mailing address for the Public
Education Team is:

((****))
((****))
((****))

((****))

Regional VPC

((****))

Bay Area & Sacramento

((****))

Los Angeles & San Diego

Site List Issues & Support

((****))



Every county throughout the state is assigned a VPC who is responsible for managing the HRA Volunteer Program in his or her district, under the direction of the District Office Manager and/or Public Service Supervisor.



As the local Volunteer Program Coordinator, your responsibilities include:

- Implementing the policies and procedures established by the Public Education Team.
- Recruiting and working with your local sponsors.
- Scheduling volunteer training classes.
- Providing training on claim preparation to the volunteers.
- Ordering materials.
- Gathering statistics and other required information from the volunteers and sponsors.
- Maintaining quality control.
- Providing volunteer recognition.

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FIELD OFFICE VOLUNTEER PROGRAM COORDINATORS

FRANCHISE TAX BOARD HRA VOLUNTEER PROGRAM COORDINATORS

District Office/Region	Mail Stop	Volunteer Program Coordinator	Address	Phone Number
Bakersfield Fresno Los Angeles Region	L17	((****))	300 S Spring Street Ste 5704 Los Angeles, CA 90013-1233	((****))
Long Beach Los Angeles Los Angeles Region	L17	((****))	300 S. Spring Street Ste 5704 Los Angeles, CA 90013-1233	((****))
Oakland San Francisco San Jose Santa Rosa Northern Region	L9	((****))	1515 Clay St Ste 305 Oakland CA 94612-1431	((****))
Sacramento Stockton Northern Region	L9	((****))	3321 Power Inn Rd Ste 250 Sacramento, CA 95826	((****))
San Diego Southern Region	L19	((****))	7575 Metropolitan Dr Ste 201 San Diego CA 92108	((****))
Santa Ana/Riverside Southern Region	L20	((****))	600 W Santa Ana Blvd Ste 300 Santa Ana CA 92701	((****))
Ventura Burbank Los Angeles Region	L21	((****))	300 S Spring Street Ste 5704 Los Angeles, CA 90013-1233	((****))



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State Controller's Office

The State Controller's Office has full responsibility for administering the Property Tax Postponement Program. FTB's role in this program is to assist qualified claimants in completing their claim forms through the volunteer program. Your contact with the State Controller's Office will be limited. You may occasionally receive a completed Property Tax Postponement claim form and you will need to forward the claim to the State Controller's Office. You may also have the need to refer a volunteer to the State Controller's toll-free telephone number for assistance.

State Controller's Office
P.O. Box 942850
Sacramento, CA 94250-5872

Public Number: 1-800-952-5661

The State Controller's Office may contact you directly to attend local fairs and exhibitions. Refer these calls to your field office manager. He or she will decide if your office will participate and who will represent FTB.

If you would like to request Property Tax Postponement booklets for your office, call the public number listed above.



Sponsors and Sponsor Responsibilities

Sponsors are recruited to organize and manage a component of the HRA Volunteer Program in his or her service area. The sponsor is responsible for:

- Recruiting volunteers.
- Scheduling training.
- Providing training and service locations.
- Scheduling volunteer work hours.
- Publicizing "their" program.
- Providing FTB with information about the service provided.

There are over 325 sponsors in the HRA program. The majority of these sponsors are also VITA or TCE Volunteer Program sponsors.

Sponsor List

The sponsor list shows the sponsor contacts for your district. The Public Education Team will provide you with a list of last year's HRA sponsors. You may insert the list after this page. The sponsor list is updated annually with the information received from the completed Sponsor Information forms (FTB 7884HRA). **The Public Education Team will ask you to make corrections, additions and deletions to the sponsor list for your area.**



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PLANNING & ADMINISTRATION

Planning and administration is essential for an effective, efficient HRA Volunteer Program. The primary planning tools are the Annual Planning Meeting and the Critical Date List or Calendar.



Annual Planning Meeting

To coordinate statewide efforts, the Public Education Team has a planning meeting each year in May with the Volunteer Program Coordinators, your backup, and your field office supervisor.

Critical Date List and Calendar

To assist you in your planning, the critical dates have been identified and are documented on the Critical Date List in this section.

Review the critical dates carefully. Plan ahead. If you have questions, ask for help from your district office manager, the other VPCs or the Public Education Team.

Significant planning dates for the HRA Volunteer Program are listed in the next column. Refer to this list frequently. Keep in mind, that you can always turn in your reports or requests early.

Critical Date List

May 8th

Start contacting last year's HRA sponsors to confirm that they plan to remain involved with the program

May 14th

The Public Education Team will mail HRA Recruitment letters to last year's HRA sponsors and volunteers.

May 21st

The Public Education Team will mail Sponsor package.

June 1st

Begin recruiting and meeting with new HRA sponsors.

June 6th

If you have received any Sponsor Information forms (FTB 7884HRA) and Site Information forms (FTB 4594HRA), forward them to the Public Education Team.

July 2nd

HRA filing season begins.



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PLANNING & ADMINISTRATION

July 16th

Begin visiting the volunteer sites in your area with management approval.

Send your completed training evaluations to the Public Education Team.

Training Report is due to the Public Education Team.

Submit all Volunteer Information forms (FTB 7885HRA).

Be sure the Public Education Team has received any of the Sponsor/ Site/Volunteer Information forms that were sent to you.

August 6th

Continue visiting the volunteer sites.

September 3rd

Begin to plan recognition events for your district.

October 16th

HRA volunteer season ends.

October 22ND

HRA recognition letters and certificates mailed to volunteers and sponsors.

Site Information

Site information is released to the public via the FTB website www.ftb.ca.gov.

FTB's Toll-Free Assistance number and state and locally funded information and referral centers also use the site list to refer individuals to volunteer sites.

Customers without Internet access, can be mailed a site list upon request.

Please encourage the sites in your area to return their Site formation forms (FTB 4595HRA) to the Public Education Team. If they return the form to you, forward it to the Public Education Team.

The database that stores sponsor, site, and volunteer information is available to VPCs in the read only mode. You will not be able to change information but should report any discrepancies or changes to the Public Education Team.

To access the database enter:

((****))



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PLANNING & ADMINISTRATION



Use of This Manual

This manual should be your primary administrative tool. It gives you guidance in almost every area of the program. If you have a question, look here FIRST to find out what the general guidelines or procedures are. Then, if you have questions about what to do, discuss the issue with the Public Education Team, your field office supervisor and the sponsor, as appropriate.

Use of HRA Letterhead and Envelopes

You should use the official HRA Letterhead and Envelopes when you correspond with HRA sponsors or volunteers. To order the letterhead and envelopes, call the Public Education Team at any time and request a supply.

Regional VPC Responsibilities

There are regional VPC assistants in the Sacramento office to help you coordinate your season. The regional VPC will check with you to make sure that your sponsor and site lists have been contacted, that your training schedules and materials orders are received in Sacramento and delivered to your office, help resolve conflicts with training schedules and work with you to submit site information for our Website. The regional VPC is there when you have questions on policy and procedure and will help resolve any issues that arise during the HRA volunteer season.



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RECRUITING

Sponsor Recruitment

Each year you need to actively recruit existing and new sponsors for the HRA Volunteer Program. Many of the sponsors have been in the program for years, and recruiting is as simple as a phone call to solicit their continued support. In other areas, new sponsors need to be identified. For the 2007 claim year, recruitment of new sponsors and volunteers is very crucial.



Existing Sponsors

By mid-May, you will receive a list from the Public Education Team of last year's sponsors. Before you receive the list, the Public Education Team will send those sponsors letters asking them for their support in this year's volunteer program. The letter also asks that they contact their local VPC (if they haven't already done so) to set up training. If by June 8th, the sponsors have not contacted you, follow the steps listed below:

1. Prior to calling, check the sponsor identification number as shown on the sponsor list to make sure it is correct (see the section "Sponsor and Site Coordination").
2. Fill in the sponsor's name, identification number, major sponsor

code, and district code on the Sponsor Information form (FTB 7884HRA).

3. Call the sponsor and recruit their continued support.

If they say "Yes":

- Fill out a Sponsor Information form and ask how many sites they expect to coordinate.
- Ask if they need any additional Site Information Forms (FTB 4595HRA) or Volunteer Site Request for Forms (FTB 3590HRA).
- Ask if they would like to schedule their training at this time or if they would like you to send them an HRA Training Request form (FTB 7651HRA).
 - Sponsor number.
 - Site number.
 - Major sponsor code.
 - County code.
 - District code.

If you have scheduled a training class complete a Training Request (FTB 7651HRA) and mark it on your calendar.

- Prepare a package for mail, include return envelopes, your business card, any forms they may need and a brief note asking that the forms be completed and returned to you within two weeks.
- Send the package to the sponsor.
- Make a copy of the sponsor



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information form for your records.

- Send the Sponsor Information form, Site Information Form, Request for Forms and Training Requests that you have completed for the sponsor to the Public Education Team.

If they say "No":

- Find out why they do not want to sponsor this year's program.
- Complete the Sponsor Information form (FTB 7884HRA) using last year's sponsor identification number.
- Write DELETE at the top of the form, and on the back of the form, indicate why they are not participating in the program.
- Return the Sponsor Information form to the Public Education Team.

New Sponsors

Recruitment and volunteer program growth for your area is the result of VPC participation. The Public Education Team may contact you with the names of potential sponsors. After June 4th, you should contact these sponsors to set up a time to meet with them.

By the first part of June, you should have a reasonable estimate of the number of HRA sponsors in your district that will be participating in this year's program. You may find that you have lost a few sponsors from last year that you would like to replace. Or you may want to target an area, which has not been active in the HRA Volunteer

Program. You may be able to recruit new sponsors over the telephone or you and your field office manager may need to coordinate a visit with the potential sponsor.

Once a sponsor says "**Yes**", they will participate:

1. Assign a sponsor number.
2. Follow the instructions shown previously under existing sponsors.

The Public Education Team will send you Sponsor Packages, at your request, to keep in your office for recruitment purposes. We will also be happy to send you blanks of any of the package forms. To request Sponsor Packages or forms, please call the Volunteer Hotline.

Volunteer Recruitment

The Public Education team recruits existing volunteers by sending them a letter reminding them to contact their sponsor if they want to be a volunteer again this year. The sponsor will also recruit volunteers.

On the FTB website, www.ftb.ca.gov, under the Filing tab, find Volunteer Programs. In this section there is an HRA Volunteer Application form. Interested volunteers can complete the application and send it by e-mail directly to the HRA volunteer coordinator mailbox in PRES. The Public Education Team looks for sites near the interested volunteer and by e-mail will refer them to that site.



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General Sponsor Responsibilities

Below is a list of general sponsor responsibilities for the HRA Volunteer Program.

You are responsible for:

- Keeping records on all of your sponsors and their volunteers and sites (see section "Record Keeping and Reports").
- Assigning each sponsor a sponsor number and a site identification number.

You and the sponsor are responsible for:

- Scheduling training for the volunteers.
- Providing the training site.
- Ordering claim forms.
- Keeping statistics about the assistance provided.
- Publicizing their sites.
- Evaluating the services provided.

The sponsor has responsibility for:

- Recruiting the volunteers.
- Providing the service site or sites.
- Scheduling the volunteer's service hours.
- Managing the volunteer site.

Sponsor Identification Number

Each sponsor must be assigned a

unique four-digit identification number. This number is used to facilitate computerized record keeping, and to associate the volunteer activity reports with the sponsor. It is vital that this number is correctly assigned. If the number was correctly assigned last year, do not change it.

If the sponsor is also a VITA/TCE sponsor, they should not use the PTIN assigned by the IRS. If the sponsor is not a VITA/TCE sponsor, they should be assigned a unique number that is not used by the VITA/TCE program.

The sponsor number is captured on the Sponsor Information form, which will be mailed directly to the sponsors in May, along with the recruitment letter.

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((****))

((****))

((****))



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((****))

((****))

AARP

AARP as an organization does not participate in the HRA Volunteer Program. However, you may have several sponsors that participated in the VITA/TCE program with a sponsor number that begins with the number nine (9). These sponsors may continue to use this four-digit number. Do not use the PTIN assigned by the IRS.

Site Identification Number

The VPC is also responsible for assigning a unique six-digit site identification number. This number is used by the Public Education Team to associate volunteer activity reports to the site, to positively identify sites when making changes to the site list, and to allow us to use computerized tracking systems. It is very important that the number be correctly assigned.

((****))

Providing the Service Site or Sites

It is the sponsor's responsibility to provide the service location. However, the sponsor will need to provide the Public Education Team with this information on the Site Information form (FTB 4595HRA) as soon as the times and locations have been finalized.

This information is used by the Public Education Team to produce the "Site List" which is updated weekly.

The site list is available on the FTB website www.ftb.ca.gov.



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The Site Information forms are mailed in May to the sponsors with the recruitment letter. All sponsors must provide the Public Education Team with this information. In some cases the sponsor may send the Site Information form to you. Please forward that information to the Public Education Team.

For the critical time frames and procedures, see "Record Keeping and Reports." See "Recruiting Sponsors and Volunteers" for instruction on what information to put on the Site Information form before sending it to a new sponsor.



Scheduling Training for Volunteers

Before you begin scheduling your training classes you should speak with your Field Office Manager to find out what resources are available to you and what days are the best for you to be out of the office conducting training.

When scheduling training, keep in mind that the average class for HRA training should last about four hours. Give yourself plenty of time to get to the training location, set-up for your class, and return the training room back to its original set-up.

You should also consider combining small groups into one larger training class. The ideal class size should be twenty or fewer volunteers.

The Training Request form will be mailed directly to the sponsors in May, along with the recruitment letter.

The sponsor should:

1. Complete Parts I and II of the training request..
2. Send the training request to the Public Education Team.

You should:

1. Contact the sponsor to confirm the date, time, and location of the training class, or indicate that there is a scheduling conflict.
2. Negotiate any scheduling conflict with the sponsor. Inform the Public Education Team if you cannot complete the request.
3. Note the time, location, and class size on your calendar. This will allow you to know at a glance when and where training is scheduled.
4. Follow-up with sponsors who have not turned in timely training requests.
5. Make arrangements to get the training materials to the training location or to the sponsor.

Providing the Training Location

The sponsor is responsible for providing the training location. It should be shown on the HRA Training Request (FTB 7651HRA).



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Once you are at the location and you feel the room, or the area is inappropriate for a training class you may need to do your best to "make do" for the initial class. Be sure to mention to the sponsor your concerns and see if you can arrange for a more suitable classroom in the future.

If your field office has a conference room, you should schedule some of the training in your office.

Ordering HRA and Property Tax Postponement Claim Forms

Sponsors are responsible for ordering the claim forms needed for their sites. As in the past, we will encourage all sponsors to order flats of forms and booklets, and to place their order in ample time for the forms to be delivered to the site prior to their opening date. For their original form order, they should allow a minimum of six weeks prior to the opening of the site. The volunteer Site Request for Forms will be mailed directly to the sponsors in May, along with the recruitment letter.

HRA Claim Forms

To order HRA claim forms the sponsor will:

1. Complete form FTB 3590HRA (Volunteer Site Request for Forms).
2. Send the completed form to the Public Education Team.

If you receive the order you will:

1. Review the order.
2. Call the sponsor if there are any discrepancies.
3. Forward the order to the Public Education Team.

Property Tax Postponement Claim Forms

To order Property Tax Postponement Claim Forms, the sponsor will:

Call the State Controller's Office at:
1-800-952-5661

Or write to:

Office of the State Controller
P.O. Box 942005
Sacramento, CA 94250-2005



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Keeping Statistics about the Assistance Provided

The Franchise Tax Board has the responsibility of collecting and tabulating the statistics for the HRA Volunteer Program. The volunteers are asked to complete a Volunteer Activity Report for any month in which HRA assistance is provided. Ask the site coordinator to collect the volunteer activity reports and send them in the same envelope they use to send in their HRA claims for processing.

The Public Education Team will send HRA Statistics Reminders (FTB 9010) to sponsors to remind them to return their activity reports.

The Public Education Team enters the data from the Volunteer Activity Reports into a computer file, which interfaces with the site list.



Publicizing Sites

The sponsor has the primary responsibility for publicizing the volunteer program through posters and local press releases.

Your primary responsibility is to: encourage the sponsor to publicize his or her sites. The Public Education Team will provide additional posters on an as-needed basis.

FTB's Public Affairs Officer usually issues statewide news releases and radio and television public service announcements.

If you receive a request to speak to a group about HRA volunteer activities or the HRA program inform your field office manager and the Public Education Team.



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There are two types of training: training for the trainers and training for the volunteers.

The VPC is responsible for making sure each class taught in his or her district has the appropriate training materials. The Public Education Team prepares the training materials. You order your training materials in May from the Public Education Team. They should be received in the field office by the first week of June.



Training for Trainers

Prior to giving a HRA class, FTB instructors should attend a one-day training class presented by the Public Education Team.

If all of the trainers from your field office are not able to attend the training class presented by the Public Education Team, work with your field office manager to set up a time when they can receive training prior to their first scheduled class. Anyone who attended the class presented by the Public Education Team would be qualified to conduct this training. Please inform the Public Education Team of any additional trainers used in your area.

Training for Volunteers

Training for volunteers varies depending upon the experience of the volunteer. In general, you should provide four full hours of instruction if you have a class of first year volunteers or a combination of first year and returning volunteers.

If you have a class made up entirely of returning volunteers, you will still want to address the material in the manual from cover to cover. However, you may be able to move along at a quicker pace and complete the instruction in less than four hours.

The training for the volunteers cover: volunteer forms and volunteer procedures, line-by-line instruction for the preparation of forms:

- FTB 9000R
- FTB 9000H
- Overview of Property Tax Postponement

Training Materials

The Public Education Team provides the following training materials:

- HRA Volunteer Reference Manual
- Self Study Problems and Quizzes



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The field office will provide all other materials (such as markers, pens, pencils, etc.).

In early May you will be contacted by the Public Education Team and asked to order training supplies. Your orders should be based on last year's usage and any new plans you may have.

By the first week of June, you should have received the HRA Volunteer Reference Manuals and the majority of the forms that you have ordered. If you have not received your training materials by this time, contact the Public Education Team.

For each training class, the sponsor will indicate the number of volunteers to be trained. Be sure you have one volunteer reference manual per volunteer plus a few extra. The manuals are expensive, so be sure to take any extra materials back to the office after your training class.

During training, the instructor will give each site coordinator a supply of self-addressed stamped manila envelopes and a supply of #10 business envelopes and instruct them to collect the completed claims and mail them directly to FTB for processing in the envelopes you have provide them.

Training Evaluation



Each volunteer at the end of each training class must complete a Training Evaluation form (FTB 7699HRA). The form is in the HRA volunteer reference manual. Assign a class number to each of your classes. Collect the completed training evaluations and forward all evaluations to the Public Education Team. This information is used by the Public Education Team to enhance the volunteer training program, the Reference Manual, and the Trainer's Guide. For more information, refer to section "Program Evaluation."



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PUBLICITY & RECOGNITION

Methods used by FTB to publicize the HRA Volunteer Program are: the site list - information and referral, statewide press releases, public presentations by members of FTB's Speakers' Bureau, and sending out posters and brochures. Sponsors have responsibility for local publicity.



Site List - Information and Referral

The site list is an information and referral tool compiled by the Public Education Team using the Site Information forms (FTB 4595HRA). It is updated from July to October. The site list is available on the Internet at www.ftb.ca.gov. The Internet is updated weekly. Customers without Internet access will be mailed a site list upon request.

The site list will no longer be distributed to legislative and Congressional offices. If you receive a request for a site list please refer them to the FTB website. www.ftb.ca.gov. If the customer does not have internet access, take their information and contact the Public Education team. FTB's Toll-Free Public Assistance number and state and locally funded information and referral centers also use the site list to refer individuals to volunteer sites.

Statewide Press Releases

FTB's Public Affairs Officer issues statewide news releases and radio and television public service announcements. This is in addition to any publicity the local HRA sponsors may do.

Sponsor's Publicity Materials

Sponsors are responsible for publicizing their program locally. The Public Education Team will prepare publicity materials that each sponsor can request. The local sponsors are encouraged to write news releases and display the volunteer posters, which publicize their volunteer program. You can assist the sponsors by sharing with them the statewide press releases that are issued by our Public Affairs Office.

Posters/Brochures

Each sponsor package will contain two posters. Additional posters and brochures will be mailed to agencies that target potential claimants.

There are several ways in which the HRA Volunteer Program is evaluated: training evaluations are completed for each class; sponsors monitor the work of the volunteers, you visit the service sites, statistics are provided by the volunteers, and evaluation meetings are held annually.



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RECORD KEEPING & REPORTS



Training Evaluation

Each volunteer at the end of each training class should complete a Training Evaluation form (FTB 7699HRA). The form is in the Volunteer Reference Manual. You should assign a class number to each of your classes, have the instructor collect the completed Training Evaluation forms and turn them in to you, and forward all evaluations to the Public Education Team. Input from the volunteers is used to improve the training program, the Volunteer Reference Manual and the Trainer's Guide.

Sponsors Monitor the Work of the Volunteers

Encourage your sponsors to monitor the work of the volunteer. If appropriate, provide the sponsor with a copy of the "Sponsor Responsibilities" handout, which outlines the responsibilities of sponsors and encourages them to be actively involved in the daily operations of their volunteer sites.

Sponsors frequently assign experienced volunteers to work with new volunteers.

If a volunteer consistently has problems, encourage the sponsor to find him or her another useful duty.

Site Visitation

The primary method of evaluating the service provided by the volunteers is site visitation by the VPC. You should also invite your field office supervisor or Customer Service Specialist to participate.

Begin to plan your site visits in mid-July. Use the site list and your calendar to plan the dates and times of your visits. Because of the time involved in visiting each site, you will not be able to visit all the sites.

It is a good idea to contact the sponsor and see if they would like to join you on your site visits. As a courtesy, call each site before you visit to confirm that the site will be open and that it is a convenient time to visit.

All site visits must be approved by your field office manager prior to the visit.

While at a site:

- Review the work being done.
- Confirm the time and dates of service.
- Talk to the volunteers and see if they are having any problems.
- See that there are enough forms at the site.
- Be sure the volunteer or site is not accepting payment for the preparation of claim forms.

Evaluation Meetings

Each November, the Public Education Team plans an HRA evaluation meeting.



Please come to the meeting prepared to discuss the number of training classes held, number of volunteers trained, number of sponsors and sites in your area, new sites and sponsors recruited, plans for future recruitment, a major goal for next year in your area, training or procedure tips to share with the other VPC's, and any changes you would like to see implemented in the reference materials or Volunteer Program.

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In addition, it is important that we maintain records on the amount of time and resources FTB expends for the HRA Volunteer Program. Therefore, VPC's are asked to turn in an annual Training Report showing the resources used and numbers of training classes given by the district.



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RECORD KEEPING & REPORTS

Volunteer Information

The Public Education Team maintains a list of HRA volunteers. This information is used to recruit volunteers to come back next year. In addition, the list is available to produce mailing labels and recognition letters.

All volunteers will complete a Volunteer Information form (FTB 7885HRA) during their training class. The form is provided in the HRA Volunteer Reference Manual.

The trainer will collect the forms at each class and forward them to the Public Education Team. Check and see that each volunteer has completed the form correctly, including his or her site number. Also, before you forward the forms to the Public Education Team complete the District Code section on the upper portion of the form. This will allow us to produce reports and keep statistics per field office.

Volunteer Activity Reports

Volunteers are asked to complete a Volunteer Activity Report (FTB 6543HRA) for any month in which HRA assistance is provided. During training the volunteers are instructed to send you their reports at the end of each month.

Ask the site coordinator to collect the volunteer activity reports and forward them in the envelopes provided them to send in claims.

The Public Education Team will send HRA Statistics Reminders to sponsors to remind them to return their activity reports.

It is critical that the site number and the name of the site be printed on each form. It is that information which ties the statistics to the site and your field office.



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RECORD KEEPING & REPORTS

Sponsor Information

VPC's are responsible for collecting sponsor information for each existing sponsor and new sponsor (see "Recruiting Sponsors and Volunteers" and "Sponsor and Site Coordination"). All information forms must be turned in to the Public Education Team so that our sponsor information file is updated. This file is used to produce the sponsor list to be used by the VPC next year to recruit existing sponsors and for recognition letters.

Site Information - Site List

The sponsor should complete the Site Information form(s) (FTB 4595HRA) and send them to the Public Education Team. They may send the form to you; please forward the information to the Public Education Team.

The Public Education Team inputs the data from the forms into the computer. All fields of the form must be completed in order to enter the information in the computer. The list is available on the Internet at www.ftb.ca.gov. The site list on the Internet is updated regularly.

Training Report

For evaluation purposes, the Public Education Team needs to be aware of the number of classes taught by each district office and the costs associated with these classes. By **July 16**, please turn in a Training Report with this information to the Public Education Team.

On the next page is a form you should follow. The easiest way to prepare this report is to make a copy of the format and have it filled out by the trainer for each class taught by your district office. You can either provide the Public Education Team with the individual reports or a summary report.

Attach the Training Evaluations for the classes taught by your field office to the back of this report (or reports) -- if you have not already turned them in.



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RECORD KEEPING & REPORTS

2007- TRAINING REPORT

Field Office _____ Date _____

VPC _____

BUDGET INFORMATION

TRAINER(S)

	<u>VPC</u>	<u>Public Service</u>	<u>Other</u>
Number of Trainers	_____	_____	_____
Class Preparation Time (at work)	_____	_____	_____
Class Preparation Time (on own)	_____	_____	_____
Time out of office for class including travel time	_____	_____	_____
Total Travel Expense	_____	_____	_____
Total Classes Given	_____	_____	_____
Total Number of Volunteers Trained	_____	_____	_____
Overtime Accrued	_____	_____	_____
Comments or suggestions on the volunteer reference manual	_____		

Comments or suggestions on the Trainer's Guide/Training Aids _____



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Below is a brief description of where the volunteers and the VPC's get support information and materials. For additional information about who to call for a problem or for information see section "Organization and Contacts".



Technical Assistance for the Volunteers

The Volunteer Reference Manual is written to provide ongoing technical assistance to the volunteers. They should be encouraged to use the manual for reference.

In addition, FTB has the Volunteer Hot Line, ((****)), for the volunteers and the toll-free information center telephone number, (800) 868-4171, for the claimants and general public.

In training, the volunteers and sponsors are given your name and telephone number and they may call on you to answer questions on volunteer procedures, and technical questions regarding form preparation.

Training Materials and Supplies

Training materials and supplies such as Volunteer Reference Manuals and posters are ordered by the VPC through the Public Education Team. See section "Training for Trainers and Volunteers" for a list of the training materials provided.

Minor Equipment

Minor equipment requests (such as luggage carts, overhead projectors, or screens) should be ordered following your normal field office procedures.

Regional VPC

A Regional VPC is assigned to Los Angeles, San Diego, Oakland, San Jose & Sacramento areas by the Public Education Team. Regional VPC's will contact you to provide site information, forms orders and any other information necessary to administer the HRA volunteer program. They are also there to answer your program questions and assist you with any difficulties you may have as VPC for your area.